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Turkey

Oilseeds and Products

Sunflowerseed and Products Update

2002

Approved by:

**James Higgiston, Agricultural Counselor
U.S. Embassy, Ankara**

Prepared by:

Ibrahim Sirtioglu, Agricultural Marketing Specialist

Report Highlights:

Due to increased area and favorable weather conditions, the MY2002 Turkish sunflowerseed production forecast was increased to 820,000MT. The recent import tariff change (TU2028) favors utilization of local sunflower seed but the continuing domestic need for sunflower oil and meal and available supplies in Black Sea countries are expected to increase sunflowerseed imports for crushing. Government policies continue to constrain imports of sun oil for refining and re-export. As a result, Turkey's refined sun oil exports decreased drastically to about 20 TMT in MY2001. At this time, sun oil exports are expected to recover during MY2002 due to availability of seed in Turkey and in the Black sea region.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Unscheduled Report
Ankara [TU1], TU

Increased area and favorable weather conditions contributed to an increase in Turkish sunflowerseed production for MY2002. Last year sunflowers provided a good financial return for farmers which encouraged them to plant more. Industry observers are now estimating area and production at 650,000 hectares and 820,000MT – one of the largest crops in recent years. Precipitation during the growing season had a positive effect on the yield, particularly in the Thrace region where 80 percent of local sunflowerseed is grown.

The expected sunflowerseed crop in the Black Sea countries along with increased domestic demand may necessitate larger imports of sunflowerseed during MY2002. Black Sea exporters including Ukraine and Russia are reportedly asking US\$260 per ton C&F Turkey for sunflowerseed.

A shortage of domestic and international supplies along with high prices resulted in a decline in sunflower meal consumption and imports in MY2001. Total year-end imports of sunflower meal are expected to be about 50,000MT compared to 149,000MT in MY2000. During MY2002, given the higher supplies in the region, sunflower meal imports are expected to increase to meet local demand.

Sun oil imports increased during MY2001 due to the lack of domestic supplies. But the GOT reluctance to issue temporary import permits forced refiners to buy from the high-priced domestic coop (Trakya Birlik). This resulted in lower stocks and a dramatic decline in sun oil exports (57,000MT in MY2000 to an estimated 20,000MT in MY2001). Sun oil exports are expected to recover in MY2002 due to availability of raw material in Turkey and in the Black Sea region.

The new import regime (TU2028) equalized oil import duties for all oils i.e., soy, corn, sun, canola - except olive oil- to 30 percent. Previously, sun oil import duties were 37.2 percent while other oils were 12 percent. The new import regime is expected to increase domestic utilization of sun oil which lost market share to imported corn and soy oil.

The GOT has not announced purchasing prices for quasi-government coops yet, but in view of upcoming general elections the industry expects an increase of 42 percent in the procurement price. The coops paid 325,000TL per kilogram to members for sunflowerseed last year.

PSD Table						
Country	Turkey					
Commodity	Oilseed, Sunflowerseed				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		09/2000		09/2001		09/2002
Area Planted	0	0	0	0	0	0
Area Harvested	540	540	550	510	630	650
Beginning Stocks	30	30	10	10	10	10
Production	575	575	520	520	700	820
MY Imports	308	308	220	165	250	250
MY Imp. from U.S.	20	20	20	4	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	913	913	750	695	960	1080
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	897	897	735	677	945	1065
Food Use Dom. Consump.	3	3	3	6	3	3
Feed,Seed,Waste Dm.Cn.	3	3	2	2	2	2
TOTAL Dom. Consumption	903	903	740	685	950	1070
Ending Stocks	10	10	10	10	10	10
TOTAL DISTRIBUTION	913	913	750	695	960	1080
Calendar Year Imports	499	499	175	183	250	250
Calendar Yr Imp. U.S.	3	3	0	8	3	3
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix			
Country	Turkey		
Commodity	Oilseed, Sunflowerseed		
Time period	MY2001	Units:	Metric tons
Imports for:	Sept/May		1
U.S.	3791	U.S.	
Others		Others	
Romania	35960		
Bulgaria	35737		
Ukraine	34870		
Moldavia	6794		
France	3319		
Russia	1798		
Uruguay	945		
Isreal	284		
Argentina	280		
Canada	219		
Total for Others	120206		0
Others not Listed	30		
Grand Total	124027		0

PSD Table						
Country	Turkey					
Commodity	Meal, Sunflowerseed					(1000 MT)(PERCENT)
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		09/2000		09/2001		09/2002
Crush	897	897	735	677	945	1065
Extr. Rate, 999.9999	0.379041	0.379041	0.380952	0.384047	0.380952	0.380282
Beginning Stocks	0	0	0	0	0	0
Production	340	340	280	260	360	405
MY Imports	149	149	250	50	200	100
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	489	489	530	310	560	505
MY Exports	0	0	5	0	5	5
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	489	489	525	310	555	500
TOTAL Dom. Consumption	489	489	525	310	555	500
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	489	489	530	310	560	505
Calendar Year Imports	282	282	130	54	240	100
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	3	3	5	5	5	5
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix			
Country	Turkey		
Commodity	Meal, Sunflowerseed		
Time period	MY2001	Units:	Metric tons
Imports for:	Sept/May		1
U.S.		U.S.	
Others		Others	
Ukraine	18153		
Bulgaria	9168		
Russia	7725		
Romania	4614		
Total for Others	39660		0
Others not Listed			
Grand Total	39660		0

PSD Table						
Country	Turkey					
Commodity	Oil, Sunflowerseed					(1000 MT)(PERCENT)
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		09/2000		09/2001		09/2002
Crush	897	897	735	677	945	1065
Extr. Rate, 999.9999	0.419175	0.419175	0.421769	0.457903	0.420106	0.450704
Beginning Stocks	60	60	30	30	20	20
Production	376	376	310	310	397	480
MY Imports	105	105	190	130	150	100
MY Imp. from U.S.	2	2	10	11	10	10
MY Imp. from the EC	2	2	0	0	5	5
TOTAL SUPPLY	541	541	530	470	567	600
MY Exports	57	57	65	20	75	60
MY Exp. to the EC	10	10	10	10	10	10
Industrial Dom. Consum	10	10	10	5	10	10
Food Use Dom. Consump.	434	434	430	415	457	490
Feed Waste Dom. Consum	10	10	5	10	5	10
TOTAL Dom. Consumption	454	454	445	430	472	510
Ending Stocks	30	30	20	20	20	30
TOTAL DISTRIBUTION	541	541	530	470	567	600
Calendar Year Imports	100	100	133	134	160	160
Calendar Yr Imp. U.S.	0	0	13	13	20	20
Calendar Year Exports	71	71	41	37	50	50
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix			
Country	Turkey		
Commodity	Oil, Sunflowerseed		
Time period	MY2001	Units:	Metric tons
Imports for:	Sept/May		1
U.S.	10904	U.S.	
Others		Others	
Argentina	40558		
Ukraine	37522		
Brazil	5477		
Romania	3986		
Bulgaria	1490		
Russia	313		
Germany	10		
Total for Others	89356		0
Others not Listed			
Grand Total	100260		0

Export Trade Matrix			
Country	Turkey		
Commodity	Oil, Sunflowerseed		
Time period	MY2001	Units:	Metric tons
Exports for:	Sept/May		1
U.S.	16	U.S.	
Others		Others	
Syria	3229		
Baltic states	1993		
Romania	1397		
Israel	851		
N.Cyprus	814		
U.A.E.	690		
Lebanon	584		
Georgia	533		
Japan	410		
Iran	272		
Total for Others	10773		0
Others not Listed	2229		
Grand Total	13018		0